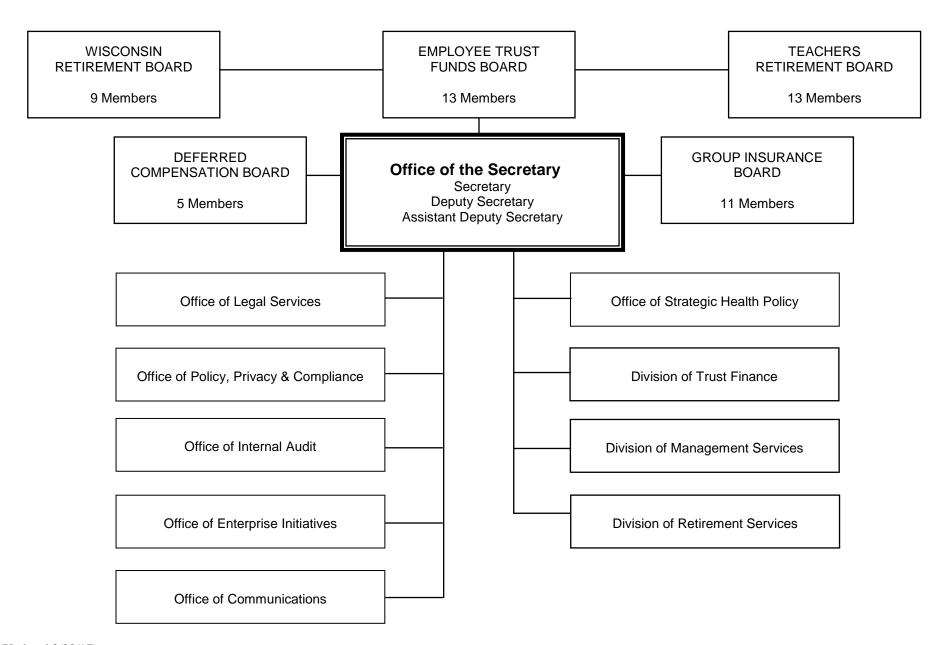
DEPARTMENT OF EMPLOYEE TRUST FUNDS FUNCTIONAL ORGANIZATIONAL CHART February 2017



DEPARTMENT OF EMPLOYEE TRUST FUNDS

Office of the Secretary

Bob Conlin, Secretary John Voelker, Deputy Secretary Pam Henning, Assistant Deputy Secretary

- Governance
- Strategic Direction
- Organization Development
- General Oversight

Tarna Hunter, Strategic Engagement & Government Relations Director

- Governmental Relations (State and Federal)
- Legislative Policy Analysis & Tracking
- Advisor to Secretary's Office and Boards on legislative issues
- Fiscal Estimate Development & Analysis
- Biennial Budget Coordination & Reporting
- Customer engagement strategies and education coordination

Kristin Gunther, Continuity of Operations Plan Manager & Policy Advisor

- Continuity of Operations (COOP)
 Plan/Pandemic Plan development
 and oversight
- Enterprise strategic planning coordination
- Team building
- Coaching and facilitation trainings
- Continuous organizational improvements and innovation

Vicki McFall, Project Manager

- Hill Farms Building plan development and oversight
- Project management, business analysis, and process improvement

Staff Services Section

- Appeals Coordination
- Board Liaisons
- Board Elections
- Executive Staff Support
- Paralegal Assistance
- · Special Meeting/Event Planning

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DEPARTMENT OF EMPLOYEE TRUST FUNDS

OFFICE OF LEGAL SERVICES

David Nispel, General Counsel (6.0 FTE, 6 Employees)

- Legal services for Secretary's Office, ETF staff, and the boards
- Provide legal opinions and analysis
- Respond to legal inquiries from courts, participants, attorneys, legislators, and others
- Respond to public records requests and subpoenas
- Represent ETF in administrative appeals and appeals of duty disability application denials
- Draft legislation and administrative rules
- Monitor and analyze state and federal legislation and work with Legislative Liaison on issues affecting ETF and WRS participants
- Assist Director of Communications in responding to inquiries from media, WRS participants, legislators, and others
- Respond to Notice of Claims filed by citizens against the State
- Ombudsperson services staff serve as a resource and provide assistance to members in an effort to resolve issues that involve WRS benefit programs and reduce the number of appeals

OFFICE OF POLICY, PRIVACY & COMPLIANCE

Steve Hurley, Director (4.0 FTE, 4 Employees)

- Policy review and development
- Analysis of proposed legislation and policy
- Federal and State regulation & compliance
- HIPAA Compliance
- Internal revenue code compliance
- Privacy policy & training
- Agency Incident Commander (COOP)

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DEPARTMENT OF EMPLOYEE TRUST FUNDS

OFFICE OF INTERNAL AUDIT

Yikchau Sze, Director (4.0 FTE, 4 Employees)

- Staff to Audit Committee of ETF Board
- Prepare and carryout biennial audit plan (financial, operational, compliance, and investigative audits)
- Coordinate responsibilities with external auditors engaged by ETF
- Review internal controls of ETF & make recommendations to Secretary's Office on risk areas

OFFICE OF ENTERPRISE INITIATIVES

Robert Martin, Director (12.80 FTE, 13 Employees)

- Transformation, Integration, and Modernization (TIM)
- Portfolio and Project Management
- Business Analysis (Standards and Templates)
- Data Integrity and Governance
- Benefit Administration System (BAS)
- BAS Technical Infrastructure
- BAS Security

OFFICE OF COMMUNICATIONS

Mark Lamkins, Director (4.0 FTE, 4 Employees)

- Overall Department communication
- Brand guide for internal and external communication
- Forms management
- Video library/social media
- External public communications
- Webmaster administration
- Strategic planning coordination

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DEPARTMENT OF EMPLOYEE TRUST FUNDS OFFICE OF STRATEGIC HEALTH POLICY

Lisa Ellinger, Director

Eileen Mallow, Deputy Director (15.0 FTE, 15 Employees)

- Primary staff to Group Insurance Board
- Staff to ETF Board (for ASLCC)
- It's Your Choice content

HEALTH BENEFITS & INSURANCE PLAN

- Health Insurance (Standard Plans, Retiree Plans, Coinsurance Plans)
- Life Insurance (State and Local, Spouse and Dependent)
- Long-Term Care Insurance
- Accumulated Sick Leave Program (ASLCC)
- Flexible Spending Accounts (medical, dependent day care, parking, and transit)
- Contract administration for above programs
- Departmental Determinations

POLICY & STRATEGIC PLANNING

- Data Analytics
- Federal Health Policy
- Disease Management
- Wellness

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DEPARTMENT OF EMPLOYEE TRUST FUNDS DIVISION OF TRUST FINANCE

Cindy Klimke-Armatoski DIVISION ADMINISTRATOR/ CHIEF TRUST FINANCE OFFICER

(22.0 FTE, 22 Employees)

- Process all financial transactions for benefit plans including contributions, benefit payments, and third party administrator invoices
- Maintain WRS member accounts
- Generate the Comprehensive Annual Financial Report

FINANCIAL COMPLIANCE BUREAU

Nanette Strennen Bureau Director

- · Financial reporting
- Actuarial reporting and analysis
- Maintain Market Recognition Account
- · Calculate effective rate
- Calculate annuity adjustments
- Calculate contribution rates
- Calculate fees
- Tax reporting
- Process cash receipts and disbursements for non-WRS programs
- Internal control plan maintenance

RETIREMENT ACCOUNTING BUREAU

Michelle Mattox Bureau Director

- Collect WRS contributions
- Maintain WRS member accounts
- Process annuitant and lump sum payroll
- Manage accounts receivable and collections
- Manage employer accounts
- Generate Statement of Benefits

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DEPARTMENT OF EMPLOYEE TRUST FUNDS DIVISION OF MANAGEMENT SERVICES

Dana Perry
DIVISION
ADMINISTRATOR

(57.5 FTE, 58 Employees)

DEPUTY ADMINISTRATOR/ HR DIRECTOR

Stacie Meyer

HUMAN RESOURCES TEAM

- · Payroll and benefits
- Training
- Employee Assistance Program
- Recruitment
- Affirmative Action/Equal Employment Opportunity
- Disability accommodations
- Classification and compensation
- Employee relations
- Internal policy development and monitoring
- · Change management
- · Health and Wellness coordination

FACILITIES

- Facility administration
- Health and safety
- Parking
- Inventory
- · Access badges

BUREAU OF BUDGET, CONTRACT ADMINISTRATION, & PROCUREMENT

- Biennial Budget
- Operating Budget
- Procurement
- · Agency contract administration
- Process accounts payable invoices
- Process travel vouchers
- Coordinate P-cards
- Develop and assist in procurements

BUREAU OF INFORMATION TECHNOLOGY SERVICES

(SEE NEXT PAGE)

BUREAU OF INFORMATION SECURITY MANAGEMENT

(SEE PAGE 8)

INFORMATION SERVICES

- Knowledge management services
- · Records Officer/liaison to Public Records Board
- · Records retention schedules
- Archive services, information acquisitions, and cataloging
- Reference and research services.

RECORDS MANAGEMENT SECTION

- Records & imaging management
- State Records Center Services
- · Microfiche historical file and printing services

SUPPLY & MAIL SERVICES SECTION

- Copier management and services
- Internal and external mail services and distribution
- · Postal budgeting, controlling, and monitoring
- Supply and forms inventory
- Benefits pre-packets and order fulfillment
- Fleet car management
- Confidential shredding

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DEPARTMENT OF EMPLOYEE TRUST FUNDS DIVISION OF MANAGEMENT SERVICES (continued)

BUREAU OF INFORMATION TECHNOLOGY SERVICES

Steve Mueller
Bureau Director/Chief Information Officer

Mark Robinson Deputy Bureau Director

- IT strategy
- IT plan implementation
- IT talent management & resource allocation
- IT capacity management
- IT project/initiative prioritization methodology
- IT architecture

APPLICATIONS DEVELOPMENT SECTION

- Computer applications development and support
- BAS Co-Development & Bridging/Interfacing
- Feasibility studies and design analysis
- Technical design architecture standards
- Production and operational support services
- Life cycle analyses for software packages and custom-developed systems
- Software development process (i.e. SDLC)
- Document imaging projects & workflow design
- Technical architectural support (for imaging and workflow, web, telephony, data systems)

QUALITY MANAGEMENT SECTION

- Existing systems maintenance
- · Quality assurance including testing
- Re-engineering projects, support, and solutions
- Change control (project requests)
- Life cycle analyses for software packages and custom-developed systems
- Software development process (i.e. SDLC)
- Product evaluation

IT SOLUTIONS CENTER SECTION

- IT property asset management
- System administration
- "Help Desk" support for all department applications
- Production support (data control, data entry, and job control services)
- Brokering/liaison for DET services
- IT hardware and software procurement
- Telecommunications
- User security and access management
- LAN, WAN, and infrastructure support and installation

DATA ADMINISTRATION & SUPPORT SECTION

- Database management
- Data administration and consultation
- Database design
- Data/information architecture

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DEPARTMENT OF EMPLOYEE TRUST FUNDS DIVISION OF MANAGEMENT SERVICES (continued)

BUREAU OF INFORMATION SECURITY MANAGEMENT

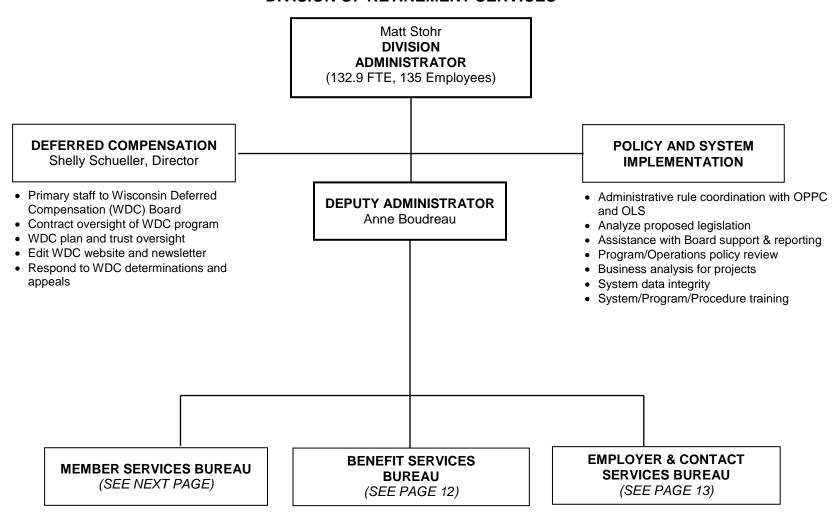
Vacant

Bureau Director/Chief Information Security Officer

- Information security strategy
- Security administration, consultation, and policy development
- Information security system administration
- Information security training
- Information security project/initiative oversight
- Security incident response planning
- IT disaster recovery and business continuity planning

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DEPARTMENT OF EMPLOYEE TRUST FUNDS DIVISION OF RETIREMENT SERVICES



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DEPARTMENT OF EMPLOYEE TRUST FUNDS DIVISION OF RETIREMENT SERVICES (continued)

MEMBER SERVICES BUREAU

Roger Fletcher Bureau Director

- One-on-one member meetings
- Conducting group retirement sessions
- Detailed explanation of WRS benefits
- Provision of account-specific information
- Calculation of complex benefit estimates (retirement, disability, death, service purchase)
- · Assistance with benefit application process
- Responses to calls, letters, and e-mail inquiries
- DRS staff training development and delivery

RETIREMENT PLANNING & OUTREACH SECTION 1

- DRS staff training development and delivery
- · Oversight of virtual appointments

RETIREMENT PLANNING & OUTREACH SECTION 2

- Maintain content of forms and brochures
- Process daily mail from members
- Coordinate SWAT activities
- Death review- Use Berwyn to ID death of inactive & lost contact members

RETIREMENT PLANNING & OUTREACH SECTION 3

- WEBS system maintenance, daily reconciliation and custom file maintenance
- · Abandoned accounts
- Visitor check-in
- · Quick service

RETIREMENT PLANNING & OUTREACH SECTION 4

- Group retirement sessions
- Public & private outreach presentations
- · Oversight of Benefit fairs
- . MSB Reporting & Statistical Analysis

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DEPARTMENT OF EMPLOYEE TRUST FUNDS DIVISION OF RETIREMENT SERVICES (continued)

BENEFIT SERVICES BUREAU

Deb Roemer Bureau Director

BENEFIT INITIATION SECTION

- Final retirement calculations & annuity corrections
- Disability retirement calculations
- Non-annuitant death benefit annuities
- Special active death lump sum benefit computations
- Retirement, death, separation eligibility determinations
- Initiating annuities on payroll
- Lump sum retirement, death, separation benefit computations
- Required distributions
- Certify life insurance coverage for retirees

DISABILITY PROGRAMS SECTION

- Benefit administration for disability programs
- §40.63 Disability Retirement Program
- §40.65 Duty Disability Program
- · Case management
- · Coordination of benefits

DISABILITY POLICY ANALYSTS & BUREAU SMEs

- Primary staff to Group Insurance Board (for ICI and LTDI programs)
- Primary staff to Teachers Retirement, Wisconsin Retirement and Employee Trust Funds Boards (for §40.63 and §40.65 disability programs)
- Income Continuation Insurance (ICI) (short and long term)
- Long-Term Disability Insurance (LTDI)
- Policy Review and Development
- Contract administration
- Departmental determinations
- Problem identification and resolution
- Training
- Special projects

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DEPARTMENT OF EMPLOYEE TRUST FUNDS DIVISION OF RETIREMENT SERVICES (continued)

EMPLOYER & CONTACT SERVICES BUREAU

Jaymee Meier Bureau Director

Kathy Wienkes Deputy Bureau Director

BUSINESS & POLICY ANALYSTS & BUREAU SUPPORT

- Projects
- Tax reporting
- Employer compliance
- Data Integrity
- Operational support
- Research and report system issues, enhancements, or requirements

CONTACT MANAGEMENT SECTION, UNITS 1 & 2

- Explanation of WRS and insurance benefits
- Provision of account-specific information
- Assistance with benefit application process
- Responses to member calls, letters, and e-mail inquiries
- Appointment booking
- Process member beneficiary designations
- Process retiree address and ACH changes

EMPLOYER SERVICES SECTION

- Employer Training and Outreach
- Employer administration manuals & forms

OPERATIONS UNIT

- Employer communication center
- Employer ETF email updates
- WRS annual earnings reconciliation
- Employer invoicing: WRS
- New employer processing: WRS
- myETF Benefits System Administration (business side)

INSURANCE UNIT

- Health insurance applications and eligibility issues
- Full File Comparison (FFC)
- Maintenance of sick leave conversion credit accounts
- Annuitant & continuant health insurance administration
- Maintaining BPS insurance deductions and reconciliation
- Retiree Medicare enrollment requirements
- · Employer invoicing: health insurance
- New employer processing: health and life insurance; ICI
- It's Your Choice Coordination

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